May 2001

Caribbean Fact Sheet

The Caribbean Sea region serves an important role in petroleum processing transshipment, with several major refineries and independent storage facilities. Trinidad and Tobago, the region's largest producer of oil and natural gas, began exporting liquefied natural gas (LNG) in April 1999.

Note: information contained in this report is the best available as of April 2001 and can change.

GENERAL BACKGROUND

The islands of the Caribbean basin, with a total population of approximately 36.5 million in 2000, and total GDP of approximately $154 billion, have made efforts to integrate their economies in the past decade. Over the period 1990-1998, the value of intra-regional exports grew an average of 8.5% per year, and intra-regional imports grew at a rate of 5.6% per year. Major regional organizations include the Caribbean Community and Common Market (CARICOM), whose members include the South American states of Guyana and Suriname and the Central American State of Belize, in addition to most of the English-speaking Islands of the Caribbean. All other islands, with the exception of Cuba, have either associate or observer status. The Caribbean Community has three objectives: (a) economic cooperation through the Caribbean Single Market and Economy (b) coordination of foreign policy among the independent Member States: and (c) common services and cooperation in functional matters such as health, education and culture, communications and industrial relations. CARICOM countries have steadily reduced tariffs among members. The other main organization of the region is the Association of Caribbean States. Another important organization is the Eastern Caribbean Currency Union and the associated Eastern Caribbean Central Bank, which includes Anguilla, Antigua and Barbuda, Dominica, Grenada, Montserrat, St. Kitts and Nevis, St. Lucia, and St. Vincent and the Grenadines.

The year 1999 was a difficult one for many smaller Caribbean nations, as a hurricane in November of that year hit the lesser Antilles and Puerto Rico. Caribbean economies recorded generally moderate to good expansion in 2000, with mixed performances by the main sectors. High international fuel prices and and increased investment in the energy sector in Trinidad and Tobago made for an increase in real GDP of 5.8% in 2000. Barbados, a small producer, also had a solid year, with growth of about 3.7% in 2000. The country with the highest growth rate of all of Latin America of the last few years has been the Dominican Republic - real GDP growth was 6.2% in 2000. Puerto Rico, the region's largest energy importer, had real GDP growth

of 3.6% in 2000. Jamaica's growth, however, was less than 1% in 2000. Agriculture and natural resource extraction activities continue to be the basis of the islands' economies, though the tourism and service sectors are growing. In the larger economies of Caribbean, manufacturing is also important, with oil and gas production stimulating related heavy industries in Trinidad; a more diversified industrial base in Puerto Rico including pharmaceuticals and cement; and the textile industry being important in the Dominican Republic and Jamaica.

OIL AND NATURAL GAS

In 1999, the islands of the Caribbean Sea consumed a combined total of 2.1 quadrillion Btu of energy. Oil is the dominant fuel, accounting for about 90% of total 1999 energy consumption. Natural gas and hydropower are used in countries that have domestic resources. Natural gas is used most extensively in Trinidad and Tobago, where gas-intensive industries such as steel, fertilizer, and petrochemicals are important to the country's economy. Puerto Rico has begun importing liquefied natural gas (LNG) from Trinidad and Tobago for power generation. The Caribbean relies on imported oil for most of its energy needs. Barbados, the Dominican Republic, Haiti, and Jamaica are party to the San Jose Pact, under which Mexico and Venezuela supply crude oil and refined products on favorable terms.

Only three Caribbean countries have oil and natural gas reserves: Barbados, Cuba, and Trinidad and Tobago. Of these, Trinidad and Tobago currently is the only significant exporter.

	Proven Reserves as of 1/1/01		Production	
	Crude Oil (1,000 barrels)	**Natural Gas (billion cubic feet)**	**Oil (crude, liquids, refinery gain) (1,000 barrels per day, 2000)**	**Natural Gas (billion cubic feet, 1999)**
Barbados	2,508	5	1	1
Cuba	283,500	636	42.75	17.7
Trinidad & Tobago	686,000	21,351	125.16	414
Total	**972,008**	**21,992**	**168.9**	**432.7**

Trinidad and Tobago

Trinidad and Tobago is by far the Caribbean's largest producer of oil and gas, with 1999 oil production averaging about 128,000 barrels per day (bbl/d) and natural gas production of 414 billion cubic feet (Bcf). The country's oil revenues alone accounted for about a quarter of the country's gross domestic product (GDP) as recently as 1997, though oil production is slowly declining. Oil revenues still constitute the largest earner of foreign exchange for the country. Crude oil reserves, at an estimated 686 million barrels, are expected to last only another decade. Natural gas reserves, however, at an estimated 21.4 trillion cubic feet (Tcf), are expected to last for about 60 years. Significant gas discoveries occurred in 2000-2001. Former Energy Minister Finbar Gangar has recently revised the government's gas reserve figure to 25 Tcf, with a possibility of 30 Tcf. BP is the nation's largest oil and gas producer, and Petrotrin is the state oil company. Petrotrin is the second largest oil producer when its two-thirds-owned subsidiary Trinmar is accounted for.

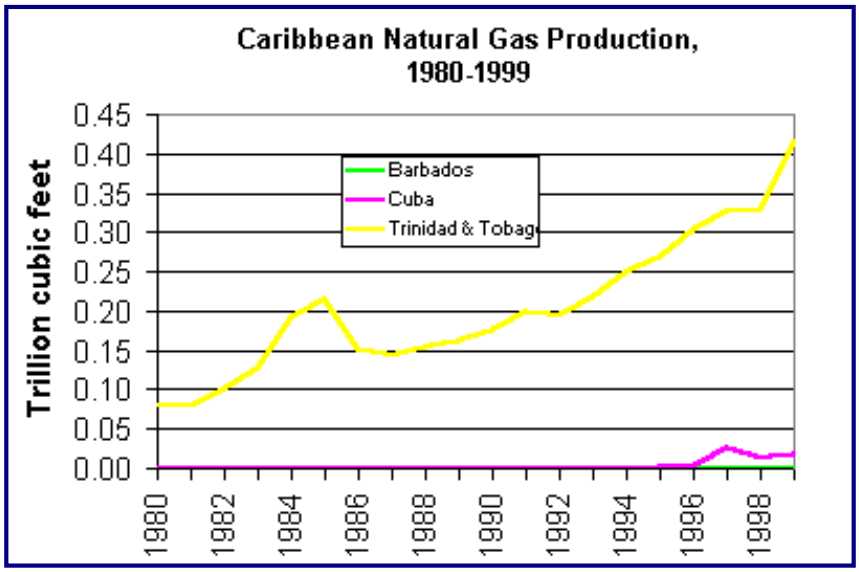
Both gas and oil exploration activities in Trinidad and Tobago continued at a fast pace in 2000 and into 2001. Nevertheless, recent oil discoveries at best have only made up for declining production in existing wells, with overall production declining steadily since its peak in 1981. The government has encouraged new exploration, based on estimates that deep-water blocks off the east coast of Trinidad could contain up to 1 billion barrels of oil, but there also is a major effort underway to find additional oil onshore. Between summer 2000 and 2003, 16 exploration wells have been or will be drilled in five-to-six onshore and near onshore blocks. The Energy Ministry is planning to offer five offshore blocks, all located adjacent to blocks containing proven reserves, for competitive bids. Among the offshore blocks currently under exploration are: Block 25(a), operated and 55% owned by Shell Trinidad; Blocks 25(b) and 26, operated by Exxon

Exploration and Production Trinidad under contract for the government; and Block 27, operated and 57% owned by Arco Trinidad Exploration and Production. The first exploratory well to complete drilling in Block 25(a) encountered no oil. Energy Minister Lindsay Gillette announced in February 2001 that Trinidad and Tobago will be mapping its last major open offshore acreage in the 'ultra-deep' region off the east coast, with plans to offer blocks for competitive bidding after completion of a seismic survey.

Trinidad and Tobago has become one of the major gas development centers in the world. Gas is expected to surpass oil as the main revenue earner for the country in the near future. Gas is used for electricity and petrochemical production, as well as heavy and light industry. Trinidad now has eight ammonia complexes (with a ninth under construction), five methanol units, a urea plant, and an iron and steel complex. Trinidad is the word's leading exporter of both ammonia and methanol. Large gas discoveries have been made recently. In May 2000, BP, in partnership with Spain's Repsol, made a 2 Tcf find off the southeast coast of Trinidad. In October 2000, BP made the largest single energy discovery in Trinidad and Tobago's history, with a large find east of the southeast coast, equivalent to 630 million barrels of oil. BP is continuing its exploration program in the area, with the company estimating that the local gas basin's reserves at about 100 Tcf. In June 2000, SHP Petroleum (subsidiary of Australia's SHP) announced that it made a second natural gas discovery off the northeast coast of Trinidad.

April 1999 saw the first loading of Trinidad and Tobago's liquefied natural gas (LNG), exported by the Atlantic LNG Company (a consortium of BP at 60%, Repsol-YPF at 20%, and Cabot Trinidad at 10%) to Spain and the United States. Trinidad and Tobago is now the largest LNG exporter to the United States. The Atlantic plant is considered the largest single-train plant ever built, and the first LNG producer in the Latin America and Caribbean region. The plant took only 6.5 years to build, from conception to operation -- the fastest ever for an LNG plant. Atlantic now plans a $1-billion expansion to triple the plant's capacity, from 3 million to 10 million tons per year, and the government in March 2000 approved the construction of two additional gas trains to be completed in 2003. BP is building one of the world's largest offshore gas processing units as part of a $500-million project to supply gas to these additional trains. The pipeline will be one of the world's largest, with the capability to transport 2 Bcf/d uncompressed. Completion of the plan will make the complex the fourth-largest in the world.

In June 2000, it was announced that U.S.-based Reema International would construct, own, and operate a Gas-to-Liquids (GTL) plant on Trinidad's western coast. It will cost an estimated $300 million and will convert 100 Mcf/d of natural gas into 10,000 bbl/d of various petroleum products. Shell International Gas Ltd. is conducting a feasibility study for a GTL plant in Trinidad as well.



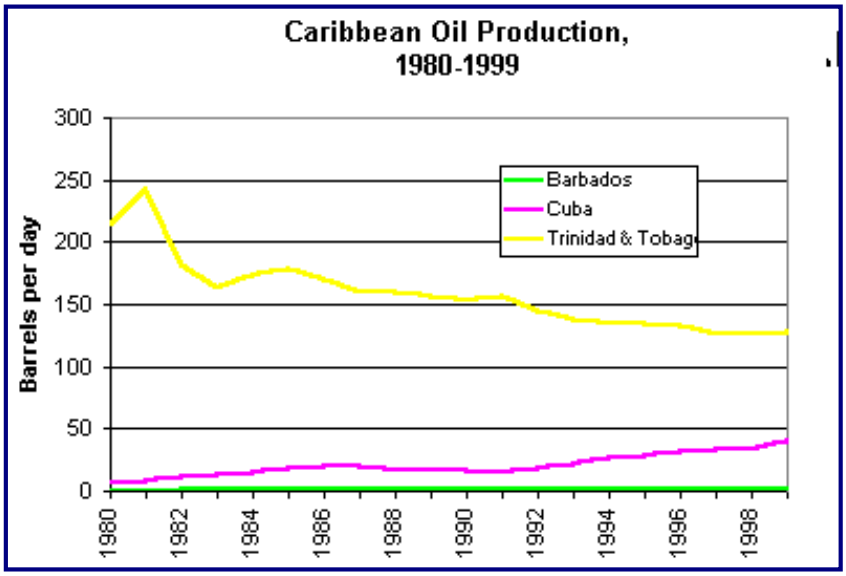
Cuba

In early 2000, Cuba offered 59 offshore blocks in its deepwater economic exclusive zone for oil exploration by international oil companies, with Spain's Repsol YPF already having begun exploration. The country currently has 19 deposits in production, and overall production has increased dramatically over the past eight years. About six foreign companies (mostly Canadian) are already active in Cuba. Between 1991 and 1999, foreign investment in oil-prospecting and production increased by $600 million. Of the 45 shallow blocks along the north coast of Cuba, 20 have been negotiated with companies from Brazil, Britain, Canada, France, Spain, and Sweden. A consortium of Sherritt International (Canada) and Petrobras (Brazil) has been drilling test wells north of Ciego de Avila

province, but so far has not made any finds. The United States maintains an economic embargo against Cuba, and oil companies from other countries may be subject to U.S. sanctions under the Helms-Burton Act of 1996.

Cuba has sought to boost its oil production in response to severe energy shortages since the collapse of the Soviet Union, which put an end to barter arrangements under which Cuba had access to relatively inexpensive oil supplies. Cuban oil production comes mainly from fields discovered in the 1960s and 1970s, when state oil company Cubapetroleo (Cupet) conducted limited exploration. However, production has increased since early 2000. Sherritt International has increased production by 5,000 bbl/d, and the Cuban government claims that overall production was up to 70,000 bbl/d by April 2001. The government has plans to dramatically increase petroleum production, with Cupet claiming that it will increase petroleum production from 52,000 bbl/d in 2001 to 120,000 bbl/d in 2005. Refineries process imported crude oil mainly from Venezuela and Mexico. Some oil is imported under the special financial arrangements of the San Jose Pact with those two countries. Most domestic production consists of heavy oil whose sulfur content is so high that it can only be used for converted power and cement plants. About two-thirds of total domestic consumption comes from imported oil.

Barbados



Oil production resumed in October 2000 after being suspended in February 1999 due to low oil prices. The Barbados National Oil Company (BNOC) plans to expand production to 3,000 bbl/d by the second-quarter of 2002 and has begun to use horizontal-drilling techniques to increase production. BNOC contracts with a consortium led by U.S.-based Waggoner Exploration to manage its projects. As Barbados has no refining capacity, its oil is refined in Trinidad, and then returned for domestic consumption. Conoco and TotalFinaElf are jointly conducting oil and gas exploration offshore Barbados.

Refining

Refining capacity in the Caribbean exceeds 1.6 million bbl/d. Smaller refineries are geared primarily to local demand, while the larger refineries in Aruba, the Netherlands Antilles, Trinidad and Tobago, and the U.S. Virgin Islands serve both local and export markets. The Hovensa refinery of St. Croix is among the largest in the Western Hemisphere, and is adding a $600-million delayed coker that will give it a deep conversion capability (meaning that lower-cost heavy crude feedstock alone can be used to produce the same light and heavy yield product slate). The Venezuelan state oil company, PdVSA, leases the Curacao Isla refinery from the government of the Netherlands Antilles, and had plans to invest $200 million over the next ten years to upgrade the refinery's facilities. In June 2000, PdVSA canceled plans to upgrade Isla and put into operation the Soviet-built refinery in Cienfuegos, Cuba. PdVSA is, however, negotiating to build a new refinery on the Dominican Republic that could process heavy crude for distribution both in the Dominican Republic and across the Caribbean. The 160,000-bbl/d, Pointe-a-Pierre refinery in Trinidad and Tobago completed its upgrading in August 1998, at a cost of $355 million. It now can handle a higher-valued range of products, such as gasoline, diesel oil, and jet fuel. Its throughput increased by about 28% in 1999, with increased crude supplies from domestic sources, such as BP's Galeota Point production, and foreign sources, such as Suriname. Trinidad's smaller Point Fortin refinery was closed recently. U.S.-based El Paso Energy's Aruba refinery suffered a large fire in April 2001 that shut down the refinery indefinitely. Sunoco plans to close its 35,000-bbl/d Yabucoa, Puerto Rico refinery in May 2001, though efforts continue

to sell the facility. Puerto Rico's other refinery, the 49,000-bbl/d facility in Bayamon owned by Caribbean Petroleum Company, reopened in February 1999. Caribbean Petroleum has requested foreign trade zone status for the facility to make it more competitive for re-export.

Storage

The Caribbean area also has independent petroleum storage facilities with the capacity to store approximately 100 million barrels of crude oil and petroleum products. In addition to long-term storage arrangements, these facilities offer logistical options for petroleum shipments. Hess' independent storage facility in St. Lucia recently doubled its capacity and Petrojam recently upgraded a small storage facility in Jamaica. PdVSA was unable to sell its storage facility owned by subsidiary Bahamas Oil Refining Company (Borco) in late 2000. Other islands with storage facilities include: Trinidad, Puerto Rico, Aruba, and St. Eustatius, Curacao, and Bonaire of the Netherlands Antilles.

Exports to the United States

In January 2001, the United States imported about 586,000 bbl/d of petroleum from the Caribbean, of which about 91% were petroleum products. The Virgin Islands was the largest single regional exporter to the United States (about 339,000 bbl/d of petroleum products), followed by Netherlands Antilles (about 141,000 bbl/d of petroleum products), Trinidad and Tobago (nearly 95,000 bbl/d of crude and petroleum products), and Puerto Rico (about 11,000 bbl/d of petroleum products). Trinidad and Tobago (55,000 bbl/d) is the only supplier of crude oil from the region. Trade flow is primarily to the U.S. Gulf and East Coasts. Trinidad and Tobago is starting a venture to sell gasoline in U.S. retail outlets.

ELECTRICITY

Electric generating capacity in the Caribbean exceeds 15 gigawatts (GW), and there is a general need for additional capacity throughout the region. Several countries (including the Dominican Republic, Haiti, and Cuba) experience power outages on a regular basis. Electricity demand in the region is expected to grow substantially in the coming decade.

The Dominican Republic

The Dominican Republic has sought to alleviate chronic shortages by buying power from private producers and privatizing selected power plants, as power cuts remain a problem for businesses and the general population. The Dominican Republic completed auctioning off its electricity assets in May 1999. However, this privatization so far has not resolved the Dominican Republic's fundamental problem of assuring a steady supply of electricity to its population. Demand is growing at about 7% per year, yet demand already outstrips supply, though not necessarily available capacity. Part of the reason for this is that droughts have periodically reduced hydroelectric power available from dams such as Aguacate. Another reason is that private generators, such as AES, Cayman Power, and Enron, have taken about 300 MW out of production because of non-payment by the government - the current debt owed to them is about $100 million. The government, however, charges Union Fenosa (Edenorte and Edsur subsidiaries) and AES (Edeeste subsidiary), the two companies that took over distribution from formerly state-owned company Corporacion Dominicana de Electricidad (CDE), with withholding funds needed to pay the suppliers. But, the distributors allege that the government does not pay for its own consumption, nor the subsidies that lower consumer electricity rates, on time, making it difficult to maintain the distribution system working effectively. (Note that Union Fenosa and AES are both distributors, through their subsidiaries, *and* private generators.) The general electricity law that may bring further privatization is still being debated in Congress.

Despite the need for further structural reform, foreign firms continue to invest in the Dominican Republic's power infrastructure. Union Fenosa and Enron reached an agreement in October 2000 to invest $550 million in a 500-MW gas-powered plant in Punta Caucedo, as well a new regasification plant. AES will invest $340 million to build a 300-MW gas-fired plant and a LNG importing terminal near Santo Domingo. Taiwan announced in August 2000 that it will build a small 5-MW diesel-fired plant costing $60 million. Union Fenosa's 190-MW Palamara y La Vega plant is now running at 100% capacity, after being inaugurated in September 2000. CDE's 3x100-MW combined cycle plant near San Pedro de Macoris is under construction by a Siemans-led consortium, with completion expected in first-quarter 2002.

Jamaica
In March 2001, it was announced that the U.S.-based utility Mirant Corp. completed an 80% acquisition of formerly government-owned Jamaica Public Service Company, the island nation's main power provider. Mirant has stated that it will make progress in reducing the number of blackouts currently affecting Jamaica due to lack of capacity. Including independent producers, installed capacity is 660 MW, and Mirant expects to add 385 MW to the system. New generation additions will be a 25 MW oil-fired steam generator before the summer peak period, an 80 MW addition to the Bogue plant in 2002, which will be converted to combined cycle operations in 2004, and additions to the Hunt's Bay plant in 2005.

Cuba
The construction of Juragua, Cuba's first nuclear power station, halted in 1992, with the plant only partially completed. Construction had begun in 1983 as the result of a 1976 Soviet-Cuban agreement. Work on the two Soviet reactor units stopped after the collapse of the Soviet Union, and on December 17, 2000, Russia and Cuba agreed to abandon the plant. In April 2001, Cuba launched the Cuban Energy Saving Program that will audit and engineer changes to reduce electricity consumption. Sherritt International in partnership with the state-owned Union Electrica is developing a 75-MW facility in addition to the 150 MW it already operates at two facilities, and studying the construction of another 140 MW of capacity. The Cuban government completed in early 2001 construction of a 250-MW unit at the Felton power plant. Many power plants are aging and are being refurbished, some with the assistance of various European companies.

U.S. Virgin Islands
U.S.-based Southern Company's offer to pay $105 million in cash, $150 million in bond debt, and $24 million in government debt to buy 80% of the U.S. Virgin Islands' Water and Power authority was rejected by the Islands' legislature in August 2000. The sale of the utility could provide cash to the U.S. Virgin Islands' government, saddled with a $1.1-billion debt, and the possibility of a sale to a more competitive bidder remains.

Puerto Rico
Puerto Rico’s primary electric power producer and grid operator, publicly-owned Puerto Rico Electrical Power Authority (PREPA), in January 2000 initiated a $2.4-billion program to increase the island's electric generation capacity. Economic growth has averaged 3% annually in recent years, and there had been concerns that electricity demands associated with economic growth would exceed generation capacity. Electricity demand is estimated to be growing at about 3.4% per year. PREPA has signed contracts with independent power producers (IPPs) to increase the island's generation capacity from about 4.6 GW to 5.8 GW by 2002. In January 2000, the EcoElectrica facility, a 507-MW, $670-million gas-fired power plant owned by Enron and Kennetech was connected to the Puerto Rican grid. In August 2000, the first shipment of LNG from Trinidad and Tobago arrived at Punta Guayanilla, near Ponce, where there is an LNG receiving terminal used to bring gas to the plant. Two more projects are planned, one to repower PREPA's aging power stations in San Juan (adding about 464 MW) and another for a new 454-MW power station, built by U.S.-based AES. The AES plant will cost $815 million and will be the first coal-fired plant in Puerto Rico. Completion is expected in mid-2002. The plant has the additional benefit of being able to sell its steam to Phillips Petroleum's Puerto Rico subsidiary. The EcoElectrica and AES facilities are part of a general plan to reduce Puerto Rico's dependence on oil for electricity generation.

RENEWABLE ENERGY

Only Jamaica and Cuba had significant amounts of power generated from geothermal, solar, wind, and wood and waste electric sources, 0.7 billion kWh and 0.4 billion kWh in 1999, respectively. The Dominican Republic was the largest producer of hydroelectricity, which at 0.9 billion kWh was greater than that produced by Cuba, Haiti, Jamaica, and Puerto Rico combined. In 1999, the Caribbean was the destination for about 2.3% of the solar thermal collectors exported by U.S. manufacturers.

Electricity in the Caribbean, 1999

	1/1/99 Installed Capacity (million kW)	1999E Net Generation (Billion kWh)
Antigua and Barbuda	0.03	0.1
Aruba (NETH)	0.09	0.45
Bahamas, The	0.40	1.47
Barbados	0.17	0.72
Cayman Islands (UK)	0.09	0.33
Cuba	4.34	14.36
Dominica	0.02	0.06
Dominican Republic	2.20	7.29
Grenada	0.03	0.12
Guadeloupe (FR)	0.42	1.30
Haiti	0.24	0.67
Jamaica	1.19	6.53
Martinique (FR)	0.12	1.10
Montserrat (UK)	0.002	0.01
Netherlands Antilles (NETH)	0.21	1.11
Puerto Rico (US)	4.58	16.76
Saint Kitts and Nevis	0.02	0.09
Saint Lucia	0.02	0.11
Saint Vincent/Grenadines	0.01	0.08
Trinidad and Tobago	1.25	4.90
Virgin Islands, U.S.	0.32	1.02
Virgin Islands, British (UK)	0.01	0.04
Total	15.76	58.62

Primary Energy Consumption in the Caribbean, 1999

Country/Territory	Total (quadrillion Btu)	Petroleum	Natural Gas	Coal	Other
Antigua and Barbuda	0.006	100%	---	---	---
Aruba (NETH)	0.008	100%	---	---	---
Bahamas, The	0.048	100%	---	---	---
Barbados	0.020	95%	5%	---	---
Cayman Islands (UK)	0.005	100%	---	---	---

Cuba*	0.386	93%	5%	1%	1%
Dominica	0.002	78%	---	---	22%
Dominican Republic	0.195	92%	---	3%	5%
Grenada	0.002	100%	---	---	---
Guadeloupe (FR)	0.025	100%	---	---	---
Haiti*	0.022	85%	---	---	14%
Jamaica*	0.156	96%	---	1%	1%
Martinique (FR)	0.027	100%	---	---	---
Montserrat (UK)	0.001	100%	---	---	---
Netherlands Antilles (NETH)	0.160	100%	---	---	---
Puerto Rico (US)	0.351	98%	---	1%	1%
Saint Kitts and Nevis	0.001	100%	---	---	---
Saint Lucia	0.003	100%	---	---	---
Saint Vincent/Grenadines	0.002	90%	---	---	10%
Trinidad and Tobago	0.400	12%	88%	---	---
Virgin Islands, U.S.	0.279	98%	---	2%	---
Virgin Islands, British (UK)	0.001	100%	---	---	---
Total/Average*	**2.106**	**92.5%**	**4.5%**	**0.4%**	**2.5%**

**Note: Because data and percentages were rounded, not all will total 100%.*

Crude Oil Refining Capacity (January 1, 2000)		
	Company/Location	**Capacity (barrels/day)**
*Aruba (NETH)**	Coastal Aruba Refining Co./San Nicolas	280,000

Cuba	Cienfuegos Ermonos Dias/Santiago Niko Lopes/Habana Serhio Soto/Cabaiguan *Subtotal, Cuba*	76,000 101,500 121,800 2,100 *301,400*
Dominican Republic	Falconbridge Dominicana/Bonao Refineria Dominicana de Petroleo/Haina *Subtotal, Dominican Republic*	16,000 33,250 *49,250*
Jamaica	Petrojam/Kingston	34,200
Martinique (FR)	Societe Anonyme de la Raffinerie des Antilles/Fort-de-France	17,000
Netherlands Antilles (NETH)	Refineria Isla Curazao/Emmastad	320,000
Puerto Rico (US)	Caribbean Petroleum Corp./Bayamon	49,000
Trinidad & Tobago	Petroleum Co. of Trinidad & Tobago/Pointe-a-Pierre	160,000
U.S. Virgin Islands	Hovensa/St. Croix	525,000
TOTAL	**13 Plants**	**1,680,850**

Source: *Oil and Gas Journal, January 1, 2001*

Sources for this report include: CIA World Factbook 2000; Dow Jones News wire service; Economist Intelligence Unit ViewsWire; Financial Times; Latin America Monitor; Latin American Newsletters; Oil and Gas Journal; Oil Daily; Petroleum Economist; International Market Insight Reports; U.S. Energy Information Administration; WEFA Latin America Economic Outlook.

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